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Global Automotive Iron Core Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive Iron Core market size is expected to reach $ 8204 million by 2032, rising at a market growth of 8.9% CAGR during the forecast period (2026-2032).

Automotive Iron Core refers to the precision magnetic core components used in automotive traction and drive motors, with stator cores and rotor cores constituting the principal product forms covered by this study. These components are typically manufactured from non-grain-oriented electrical steel through high-speed precision stamping, lamination stacking and fixation processes such as interlocking, welding, bonding or other mechanical joining methods. Product performance is closely related to electrical-steel grade and thickness, stamping accuracy, stacking factor, dimensional consistency, core loss, magnetic flux density and mechanical stability under high rotational speeds. The market primarily serves electric and electrified vehicle powertrains, including BEV, PHEV, EREV, HEV, MHEV and FCEV applications, and covers motor cores used in permanent-magnet synchronous, induction and other automotive traction motor architectures. The research focuses on commercially supplied automotive drive-motor stator and rotor cores and their associated precision lamination technologies, where manufacturing capability directly influences motor efficiency, power density, thermal performance, NVH and overall drivetrain reliability.

Key Findings

Automotive Iron Core demand is increasingly linked to the continued electrification of passenger and commercial vehicle powertrains

Stator cores and rotor cores remain the two fundamental product categories in

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automotive traction motor applications

China represents the most important demand and manufacturing cluster, supported by its large-scale electrified vehicle industry

Thin electrical steel, precision stamping and bonding technologies are becoming increasingly important for high-efficiency and high-speed motors

Competition increasingly depends on tooling capability, process know-how, customer qualification, localized capacity and large-scale manufacturing

Market Trends

The Automotive Iron Core industry is moving toward thinner electrical-steel laminations, higher dimensional precision, lower iron loss and more advanced stacking technologies as automotive traction motors evolve toward higher rotational speeds, higher power density and improved energy efficiency. Conventional interlocking and welding processes remain widely used, while adhesive bonding and self-bonding technologies are receiving greater attention because reducing mechanical deformation and interlayer gaps can improve stacking quality and magnetic performance. POSCO Mobility Solution has commercialized and developed EMFree and self-bonding approaches, while Tempel has introduced full-surface bonding technology for motor laminations. Chinese suppliers are also extending their capabilities into thin-gauge electrical steel, bonded cores and motor-core assemblies designed for high-voltage and oil-cooled drive motors. At the same time, motor-core manufacturers are moving beyond simple stamping toward integrated engineering covering precision dies, lamination forming, stacking, rotor assembly and stator-related components, increasing the importance of co-development capabilities with traction-motor customers.

Market Dynamics

Drivers

The primary demand driver for Automotive Iron Core is the structural increase in electrified vehicle production. Electric vehicles represented a rising share of global vehicle sales in 2025 and 2026, while BEV, PHEV and hybrid architectures continue to expand across major automotive markets. Each electrified drivetrain requires high-precision magnetic components, directly linking motor-core demand to traction-motor

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production. The simultaneous transition toward higher-efficiency motors, higher-speed operation, higher-voltage platforms and compact e-drive systems further increases technical requirements and value creation opportunities for qualified core manufacturers.

Restraints

Automotive Iron Core manufacturing remains capital-, tooling- and process-intensive. High-volume programs require precision progressive dies, dedicated high-speed presses, automated stacking and inspection systems, while thinner electrical steel raises challenges in stamping stability, burr control, deformation management and material utilization. Raw-material cost and availability, particularly for high-grade non-grain-oriented electrical steel, can also influence production economics. In addition, automotive qualification cycles are relatively long, making it difficult for new entrants to rapidly convert nominal production capacity into stable commercial supply.

Opportunities

The strongest opportunities are shifting toward higher-performance drive-motor programs rather than simple capacity expansion. Demand for thin-gauge laminations, low-loss cores, self-bonded or adhesive-bonded structures, skewed rotor stacks and highly integrated stator/rotor assemblies is creating additional differentiation. High-voltage platforms, oil-cooled motors and applications requiring higher speed and power density are raising the technical content of Automotive Iron Core products. Regional localization also provides opportunities for manufacturers capable of duplicating qualified processes across multiple production bases and supplying global automotive customers near their vehicle or motor plants.

Challenges

The industry faces increasing pressure to simultaneously achieve lower cost, higher precision and faster product industrialization. Automotive customers require consistent core loss, dimensional accuracy, stack height, bonding or welding strength and high-speed mechanical reliability across very large production volumes. Meanwhile, rapid changes in motor architecture and vehicle platforms can shorten product cycles and increase tooling investment risk. Suppliers must therefore balance capacity expansion with customer-specific tooling, process flexibility and utilization rates, while maintaining

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automotive-grade quality systems and supply-chain resilience.

Industry Chain Analysis

The Automotive Iron Core industry chain begins with non-grain-oriented electrical steel, insulation coatings, bonding materials, precision tooling materials and specialized stamping and automation equipment. High-performance electrical steel is particularly important because sheet thickness, magnetic loss characteristics and mechanical properties affect both motor efficiency and manufacturability. The midstream manufacturing process centers on precision die development, slitting or material preparation, high-speed stamping, stator and rotor lamination forming, stacking, interlocking, welding or bonding, dimensional inspection and, for selected programs, further integration with magnets, shafts, cast-aluminum rotors or stator assemblies. POSCO Mobility Solution, for example, identifies motor cores as stator-and-rotor assemblies whose design and manufacturing quality directly influence e-motor efficiency, while suppliers such as Tongda have developed integrated stamping, stacking, welding and bonding capabilities for new-energy vehicle programs.

Downstream customers mainly consist of traction-motor manufacturers, electric-drive system suppliers and automotive OEMs. Value creation is progressively shifting from basic lamination processing toward precision tooling, process engineering, low-loss stacking technology, automated quality control and localized mass-production capability. Electrical steel represents an important cost component, but competitive profitability is also influenced by stamping yield, scrap control, die life, equipment utilization and the ability to amortize dedicated tooling over large automotive programs. Manufacturers capable of participating early in motor design and subsequently transferring validated processes into high-volume production generally occupy a stronger position in the value chain.

Segment Insights

By product structure, stator cores and rotor cores constitute the fundamental Automotive Iron Core segments. Their manufacturing processes share electrical-steel stamping and stacking technologies, but product requirements differ substantially in slot geometry, concentricity, rotor mechanical strength, magnet accommodation and high-speed stability. Permanent-magnet traction motor cores represent an important mainstream technology direction, while induction and other motor architectures maintain applications in selected vehicle platforms. Chinese manufacturer Tongda indicates that

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permanent-magnet structures account for the majority of its new-energy vehicle drive-core products, while induction structures are also supplied, illustrating the coexistence of multiple motor technologies within the market.

From a manufacturing-process perspective, conventional interlocked and welded cores continue to support large-volume automotive programs, whereas bonded and self-bonded cores are becoming a higher-value technology segment. The latter can reduce localized mechanical stresses and interlaminar gaps and is increasingly relevant where customers prioritize lower core losses, higher motor efficiency and improved NVH. Consequently, future product differentiation is expected to depend less on whether a supplier can perform conventional stamping and more on its capability to process thinner materials, control precision at scale and industrialize advanced stacking technologies.

Downstream Market Opportunities

Electrified passenger vehicles remain the principal downstream opportunity for Automotive Iron Core, while commercial vehicles, hybrid platforms and range-extended vehicles provide additional demand diversity. The expansion of high-voltage electric architectures, high-speed traction motors and oil-cooled systems is increasing requirements for thin electrical steel, low core loss, precise stack geometry and reliable bonding. At the same time, vehicle manufacturers continue to diversify powertrain architectures rather than converging on a single motor design, creating opportunities for suppliers with flexible tooling and production systems capable of supporting permanent-magnet, induction and other traction-motor configurations. Commercial vehicle electrification also broadens the addressable market for larger-diameter and higher-output motor cores.

Regional Insights

China is the most important demand and manufacturing center for Automotive Iron Core, supported by the scale of its electrified vehicle industry and an established local supply chain for electrical steel, precision dies, motor laminations and complete electric-drive systems. Electric cars represented close to 55% of new-car sales in China in 2025, and China accounted for around six out of ten electric cars sold globally, providing a substantial downstream production base for automotive motor-core suppliers. The domestic supplier structure ranges from specialized precision-core manufacturers to diversified motor-component producers with integrated tooling,

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stamping, stacking and assembly capabilities.

Europe, Japan, South Korea and North America remain strategically important markets because of their established automotive and electric-motor industries and the presence of major global Automotive Iron Core suppliers. Localization is becoming increasingly important: Mitsui High-tec operates a multi-region production strategy spanning Japan, China, Europe and the Americas, while Worthington Steel strengthened its European electric-motor lamination position through its controlling investment in Sitem Group. The broader industry direction is therefore toward production networks located closer to vehicle and traction-motor manufacturing clusters rather than highly centralized export-only supply models.

Competitive Landscape Analysis

The Automotive Iron Core market has a mixed competitive structure consisting of globally established precision lamination specialists, steel-group-affiliated motor-core manufacturers and increasingly capable Chinese precision-stamping companies. Mitsui High-tec and EuroGroup Laminations have developed international production footprints focused on automotive motor laminations; Tempel combines electrical-steel lamination expertise with expanding bonding technologies and a broader international manufacturing network; POSCO Mobility Solution combines access to electrical-steel expertise with dedicated traction motor-core technology; while Chinese companies such as Xinzhi Group, Zhenyu Technology, Tongda Silicon Steel and other confirmed domestic suppliers compete through high-volume precision stamping, integrated tooling and increasingly sophisticated bonding and assembly processes. Competition is therefore not determined solely by nominal production capacity. Automotive customer qualification, precision-die development, thin-sheet processing, material utilization, stacking technology, automation, global plant replication and the ability to maintain consistent quality across large-volume programs increasingly determine supplier positioning. The market is also showing a gradual shift from standalone stamped laminations toward higher-value motor-core and stator/rotor subassemblies, which may further differentiate suppliers with deeper engineering and system-integration capabilities.

Report Scope

This report studies the global Automotive Iron Core demand, key companies, and key

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regions.

This report is a detailed and comprehensive analysis of the world market for Automotive Iron Core, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automotive Iron Core that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive Iron Core total market, 2021-2032, (USD Million)

Global Automotive Iron Core total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Automotive Iron Core total market, key domestic companies, and share, (USD Million)

Global Automotive Iron Core revenue by player, revenue and market share 2021-2026, (USD Million)

Global Automotive Iron Core total market by Type, CAGR, 2021-2032, (USD Million)

Global Automotive Iron Core total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Automotive Iron Core market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Mitsui High-tec, Inc., Jiangsu Lianbo Precision Technology Co., Ltd., EuroGroup Laminations S.p.A., Xinzhi Group Co., Ltd., JFE Shoji Corporation, Ningbo Zhenyu Technology Co., Ltd., Worthington Steel, Inc. (Tempel), R.Bourgeois S.A., POSCO Mobility Solution, Jiangyin Huaxin Precision Technology Corporation, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

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Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Automotive Iron Core market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Automotive Iron Core Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Automotive Iron Core Market, Segmentation by Type:

Stator Core

Rotor Core

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Global Automotive Iron Core Market, Segmentation by Motor Technology:

Permanent Magnet Synchronous Motor (PMSM)

Induction Motor (IM)

Electrically Excited Synchronous Motor (EESM)

Others

Global Automotive Iron Core Market, Segmentation by Magnetic Flux Configuration:

Radial Flux Motor Core

Axial Flux Motor Core

Others

Global Automotive Iron Core Market, Segmentation by Application:

Passenger Cars

Commercial Vehicles

Companies Profiled:

Mitsui High-tec, Inc.

Jiangsu Lianbo Precision Technology Co., Ltd.

EuroGroup Laminations S.p.A.

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Xinzhi Group Co., Ltd.

JFE Shoji Corporation

Ningbo Zhenyu Technology Co., Ltd.

Worthington Steel, Inc. (Tempel)

R.Bourgeois S.A.

POSCO Mobility Solution

Jiangyin Huaxin Precision Technology Corporation

Nantong Tongda Silicon Steel Technology Co., Ltd.

YUMA Precision Technology (Jiangsu) Co., Ltd.

Wuxi Longsheng Technology Co., Ltd.

Zhejiang Shiri Electromechanical Technology Co., Ltd.

Zhuoerbo (Ningbo) Precision Electromechanical Co., Ltd.

Shandong Boyuan Precision Machinery Co., Ltd.

Zhejiang Jufeng Technology Co., Ltd.

Key Questions Answered

1. How big is the global Automotive Iron Core market?
2. What is the demand of the global Automotive Iron Core market?
3. What is the year over year growth of the global Automotive Iron Core market?
4. What is the total value of the global Automotive Iron Core market?
5. Who are the Major Players in the global Automotive Iron Core market?
6. What are the growth factors driving the market demand?

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